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ABSTRACT

Written by a technical committee's industry representatives, state officials, and educators in Oregon, this document lists the skills and knowledge required by employees in travel and tourism occupations. The following occupations are considered: rental representative; service agent; travel agent; bus/tour/driver/guide/sightseeing leader; manager or convention center director; airline agent; flight attendant; visitor's center information coordinator; tourism director; and convention sales director. The guide begins with a list of 12 clusters of employability skills. A matrix matches each of the seven job duties identified with appropriate tasks for each of these occupations and ranks the skills by entry, retention, or advanced levels. The guide also identifies the industry standards (performance objectives), the steps that are required to accomplish the tasks to meet these standards (performance guide), and the necessary tools and equipment for each. The skills are grouped into the following categories: (1) clerical functions; (2) public relations duties; (3) sales functions; (4) inspection and maintenance; (5) personnel functions; (6) general managerial duties; and (7) fiscal management duties. (KC)

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INTRODUCTION

The Carl D. Perkins Vocational Education Act (PL 98-524) requires that each state establish at least two technical committees per year. The purpose of these technical committees is to identify the skills and knowledges required for occupations for which training is provided for in the state.

The technical committees are composed of members from business, industry, professional associations, and labor, as well as persons with special expertise. In addition, there is one ex officio representative from each of the following areas:

- State Advisory Council for Career and Vocational Education
- Secondary vocational programs
- Community college vocational programs
- Teacher education/higher education

The committees identify the skills and knowledges required in the occupation at three levels.

1. Entry--The skills necessary to obtain the job.

2. Retention--The skills necessary to retain the job beyond the probationary period.

3. Advanced--The skills necessary to advance in the occupation; i.e., journeyperson level.

The work will be used to determine the competencies required in each vocational program and to improve the existing curriculum statewide.

The report reflects many hours and a strong commitment to educational excellence on the part of the committee members. The Department appreciates the work of the committee.

For more information contact Colleen Mileham at 378-3584.

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HOW TO USE THE REPORT OF THE TECHNICAL COMMITTEE

The Technical Committee has identified the skills and knowledges required by employees in a certain occupational area. They have also identified the industry standard (in the performance objective) and the steps that are required to accomplish the task to meet the industry standard (performance guide). Many times there are several ways to competently perform a task, the one given is a suggestion.

The report does not differentiate between skills that can be taught at the secondary or postsecondary level. It is a picture of the occupation and the skills an employee must be able to perform. Thus this document is not a curriculum guide. It is the first step of developing your curriculum or program. Each local advisory committee should review the tasks to determine if they meet local needs. Many times there will be additional tasks that the local committee will identify as being necessary.

Each skill in this report is ranked as being Entry (needed to get the job), retention (needed to keep the job), or advanced (needed to advance in the job or be considered fully responsible in the job).

Once a local committee has reviewed the tasks and the performance objectives, the teacher needs to identify which of these skills are appropriate for each level of instruction. (The statewide education committee will also be doing this and their recommendations can be used as a guide.)

Once the skills have been identified for which instruction will be provided, resources need to be identified and evaluated. Again the statewide education committee will be doing this and recommending three to four excellent resources. The teacher/instructor will need to review the material also to determine if additional skills as recommended by their local committee are adequately covered.

Again, this document is not a curriculum; it provides the necessary skills for employment as identified by industry. It also provides performance objectives from which competencies and instructional objectives may be written.

For more information and technical assistance, contact the Department of Education, Division of Vocational Technical Education, 378-3584.

SUMMARY OF MEETINGS

The Travel/Tourism Committee met twice to identify the skills and performance objectives necessary for a variety of jobs in the broad category of Travel/Tourism. The committee identified the job titles which are listed on page 5. Jobs in this area range from convention/visitors bureau to travel agents to reservation agents. The committee found it necessary to develop the skills due to a lack of available resources.

Teri Justice of the Salem Visitors and Convention Bureau provided special assistance in identifying the tasks.

MEMBERSHIP OF THE SUBCOMMITTEE
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JOB TITLES CONSIDERED

Rental Representative
Service Agent
Travel Agent
Bus/Tour/Driver/Guide/Sightseeing
Manager (Convention Center Director)
Airline Agent--Ticket/Ramp
Airline Reservation Agent
Flight Attendant
Visitor's Center Information Coordinator
Tourism Director
Convention Sales Director

TRAVEL/TOURISM

EMPLOYABILITY SKILLS

Duty A: Identifying Employment Opportunities

Skills:

1. Identify requirements for job.
2. Investigate educational opportunities.
3. Investigate occupational opportunities.
4. Locate resources for finding employment.
5. Confer with prospective employers.
6. Identify job trends.
7. Identify career ladders to increase salary opportunities.
8. Recognize and overcome sexual stereotyping in the industry.

Duty B: Applying Employment Seeking Skills

Skills:

1. Locate job openings.
2. Document skills and abilities (resume).
3. Prepare for interview.
4. Participate in interview.
5. Complete required tests.
6. complete required forms.
7. Write application letter.
8. Write followup letter.
9. Write acceptance letter.
10. Evaluate job offer.
11. Evaluate job rejection.
12. Awareness of the need for multilanguage communication skills.

13. Ability to listen.

14. Ability to sell yourself.

Duty C: Interpreting Employment Capabilities

Skills:

1. Match interest to job area.
2. Match aptitude to job area.
3. Verify abilities.
4. Identify immediate work goal.
5. Develop career plan.
6. Presentation skills; i.e., marketing and visual enhancements.

Duty D: Demonstrating Appropriate Work Behavior

Skills:

1. Exhibit dependability.
2. Demonstrate punctuality.
3. Follow rules and regulations.
4. Recognize the consequences of dishonesty.
5. Complete assignments in accurate and timely manner.
6. Control emotions.
7. Assume responsibility for own decisions and actions.
8. Exhibit pride and loyalty.
9. Exhibit ability to handle pressures and tensions.
10. Demonstrate ability to set priorities.
11. Demonstrate problemsolving skills.
12. Civic and community involvement.

Duty E: Maintaining Safe and Healthy Environment

Skills:

1. Comply with safety and health rules.
2. Select correct tools and equipment.
3. Utilize equipment correctly.
4. Demonstrate work safety.
5. Use appropriate action during emergencies.
6. Maintain clean and orderly work area.
7. Demonstrate personal hygiene and grooming skills.
8. Apply first aid.
9. Apply CPR.
10. Apply abdominal thrust method.
11. Recognize your role and the benefit of main taining a safe and healthy environment.

Duty F: Maintaining BusinessLike Image

Skills:

1. Participate in company or agency orientation.
2. Demonstrate knowledge of company or agency products and services.
3. Exhibit positive behavior.
4. Read current jobrelated publications.
5. Support and promote employer's company image and purpose.
6. Maintain appearance to comply with company standards.
7. Maintain relationship with trade, civic, and professional organizations.
8. Dress for success.

Duty G: maintaining Working Relations With Others

Skills:

1. Work productively with others.

2. Show empathy, respect, and support for others.
3. Demonstrate procedures and assist others when necessary.
4. Recognize, analyze, and solve or refer problems.
5. Minimize occurrence of problems.
6. Channel emotional reaction constructively.
7. Recognize job stress and develop a positive work environment.
8. Share job knowledge with others.
9. Maintain a positive attitude.

Duty H: Communicating on the Job

Skills:

1. Read and comprehend written communications and information.
2. Use correct grammar.
3. Speak effectively with others.
4. Use jobrelated terminology.
5. Listen attentively.
6. Write legibly.
7. Use telephone etiquette.
8. Follow written and oral directions.
9. Ask questions.
10. Locate information in order to accomplish task.
11. Prepare written communication.
12. Utilize keyboarding skills.
13. Utilize computer skills.
14. Awareness of computer application.
15. Demonstrate the hospitality mentality.
16. Suggestive selling.
17. The adoption of basic conversation skills.

Duty I: Adapting to Change

Skills:

1. Recognize need to change.
2. Demonstrate willingness to learn.
3. Demonstrate flexibility.
4. Participate in continuing education.
5. Seek work challenges.
6. Adjust career goals/plan as needed.
7. Demonstrate ability to create and innovate on the job.
8. Seek positive approach before weighing negative impacts. Accept constructive criticism.
9. Willingness to take risk.

Duty J: Understanding How a Business Works

Skills:

1. Recognize the role of business in the enter prise system.
2. Identify general responsibilities of employees.
3. Identify general responsibilities of management/employers.
4. Investigate opportunities and options for business ownership.
5. Identify planning processes needed to open a business.
6. Knowledge of liability issues; i.e., liquor.
7. Knowledge of equal opportunity, affirmative action, and related personnel issues.
8. Legal issues and responsibilities.
9. Participate in meetings.
10. Understand governmental/regulatory programs affecting and serving business.
11. Realize ability to affect legislative process.

Duty K: Performing Mathematical Skills

Skills:

1. Apply mathematics for problemsolving.
2. Add and subtract whole numbers, decimals, and fractions.
3. Multiply and divide whole numbers, decimals, and fractions.
4. Convert numbers between forms expressed as fractions, decimals, and percents.
5. Convert between standard American units of measure.
6. Convert between standard American units and metric units.
7. Ability to do simple computations without a calculator.

Duty L: Leadership Skills (Supervisory)

Skills:

1. Give subordinates a sense of worth to the organization and enough freedom with responsibility to execute duties.
2. Provide constant feedback on the quality and quantity of work performance (employer).
3. Provide subordinates proportionately greater responsibility.

SKILL INVENTORY MATRIX
TRAVEL/TOURISM

INSTRUCTIONS: Listed are the manipulative and knowledge skills relating to the Travel/Tourism occupations. To the right of the page are listed the occupational titles used for this validation. Each task must be verified as to an Entry level skill, a Retention level skill, or an Advancement level skill. Place an "E" for Entry level, and "R" for Retention level, or an "A" for advancement level in the appropriate box indicating a task performed in the appropriate occupation.

DUTY NO.	TASK NO.	TASK DESCRIPTION	Rental Representative	Service Agent	Travel Agent	Bus/Tour/Driver Guide/Sightseeing	Manager (Convention Center Director)	Airline Agent Ticket/Ramp	Airline Reservation Agent	Flight Attendant	Visitors Center Info. Coordinator	Tourism Director	Convention Sales Director	Performance Objective
A		PERFORMING CLERICAL FUNCTIONS												
	1.	Make motel, entertainment, and transportation arrangements	R		E	E		E	E			E	E	1
	2.	Process telephone calls			E		E	E	E	E	E	E	E	2
	3.	Process mail			E		E				E			3
	4.	Compose correspondence			E	E	E	E		E	E			4
	5.	Compile information for technical reports	R		R	R	R				E	E	E	5
	6.	Maintain alphabetical, numerical, and subject filing system	R		R	R	R				E			6
	7.	Maintain inventory of office supplies	R	R	E	E		R	R	R	E			7
	8.	Maintain inventory of brochures/promotional items									E			8
	9.	Compose abstracts of articles and reports					R							9
	10.	Duplicate material(s) on copying machine	E		E	E	E				E	E	E	10
	11.	Proofread typewritten copy			E	E	E				E	E	E	11
	12.	Type correspondence, forms, and reports	E		E	E	E							12
	13.	Complete forms	E	E	E	E	E				E	E	E	13
	14.	Schedule meetings					E				E	E	E	14
	15.	Maintain an appointment and calendar system			R	R	R					E	E	15
	16.	Use computer terminal and related programs	E		E		A	R	R		E	E	E	16
	17.	Stock brochure racks									E			17
	18.	Receive visitors	R	R	E	E	E				E	E	E	18
	19.	Explain fees	E		R	R	R				E			19
	20.	Answer guest/client inquiries					E				E	E	E	20
B		PERFORMING PUBLIC RELATION DUTIES												
	1.	Develop and implement public relation program												21
	2.	Establish and maintain client resource file and materials										E	E	22
	3.	Establish marketing and promotional programs					E					E	E	23
	4.	Deal effectively with individuals and groups in a courteous, tactful manner	E	E	E	E	E	E	E	E	E	E	E	24
	5.	Draft/edit monthly newsletter									E			25
	6.	Convey information orally	E	E	E	E	E	E	E	E	E	E	E	26
	7.	Write and distribute news media releases									E		E	27
	8.	Work with tourism related and promotional projects					E				E	E	E	28
	9.	Manage production of all brochures					E							29
	10.	Coordinate with local and regional campaigns and services					E					E	E	30
	11.	Coordinate tours					E					E	E	31
	12.	Develop information kit					E					E	E	32
	13.	Establish working relationships with tour operators					E					E	E	33

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C		PERFORMING SALES FUNCTIONS												
	1.	Manage promotional programs	R				E				E	E	E	34
	2.	Promote/sell conferences/conventions					E						E	35
	3.	Develop convention services					E						E	36
	4.	Promote new account interest	E											37
	5.	Write bid proposals and invitations											E	38
	6.	Present bid proposals											E	39
	7.	Collect bid proposals and invitations											E	40
	8.	Reserve cars for future rental	E											41
	9.	Handle/process customer complaints												42
	10.	Solve reservation problems	E											43
	11.	Assist local establishments with convention bids											E	44
	12.	Erect/arrange exhibits and displays												45
	13.	Conduct site tours											E	46
D		PERFORMING INSPECTION AND MAINTENANCE												
	1.	Fill gas tanks		E		E								47
	2.	Service vehicles		E		E								48
E		PERFORMING PERSONNEL FUNCTIONS												
	1.	Write a job description					R				A	R		49
	2.	Orient new employees/volunteers	R	R	A	R	E	R	R	R	E			50
	3.	Plan physical layout of office					E							51
	4.	Update office manual or instruction book for employees/volunteers	E				E	R						52
	5.	Recruit/interview personnel					E				R	E	E	53
	6.	Make work assignments	R	R	R	R	E	E			E	E	E	54
	7.	Conduct employee performance evaluation					E							55
	8.	Provide employees/volunteers with support materials					E				E	E	E	56
	9.	Develop employee/volunteer communication programs and skills					R				E	R	R	57
	10.	Supervise employees/volunteers					E				E	E	E	58
F		PERFORMING GENERAL MANAGERIAL DUTIES												
	1.	Write periodic reports	A	A	A		E	E	E	R	E	E	E	59
	2.	Attend professional trade shows					E					E	E	60

SKILL INVENTORY MATRIX
TRAVEL/TOURISM

INSTRUCTIONS: Listed are the manipulative and knowledge skills relating to the Travel/Tourism occupations. To the right of the page are listed the occupational titles used for this validation. Each task must be verified as to an Entry level skill, a Retention level skill, or an Advancement level skill. Place an "E" for Entry level, and "R" for Retention level, or an "A" for advancement level in the appropriate box indicating a task performed in the appropriate occupation.

DUTY NO.	TASK NO.	TASK DESCRIPTION	Rental Representative	Service Agent	Travel Agent	Bus/Tour/Driver Guide/Sightseeing	Manager (Convention Center Director)	Airline Agent Ticket/Ramp	Airline Reservation Agent	Flight Attendant	Visitors Center Info. Coordinator	Tourism Director	Convention Sales Director	Performance Objective
	3.	Develop agendas for board meetings					E							61
	4.	Maintain tickler file											E	62
	5.	Evaluate programs	E	E	E	E	E	E	E	E	A	R	R	63
	6.	Prepare performance report					E				A	R	R	64
	7.	Attend Board of Director's meetings					E				E	E	E	65
	8.	Act as a liaison with local merchants/groups					E				E	E	E	66
	9.	Authorize brochure displays					E					E		67
G		PERFORMING FISCAL MANAGEMENT DUTIES												
	1.	Prepare bank deposits	E				E							68
	2.	Prepare statistical report(s)	A	A	R	R	E				E	E	E	69
	3.	Maintain cash flow program					E							70
	4.	Maintain operation budget system					E							71
	5.	Maintain standard accounting system					E							72
	6.	Reconcile monthly bank accounts												73
	7.	Determine optimum process for reproducing printed materials	A		A		E	E			E			74
	8.	Prepare budgets	A	A			E							75
	9.	Prepare statement for mailing	E		E	E	E							76
	10.	Audit daily business	R											77
	11.	Prepare financial reports					E							78

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A. Duty: Performing Clerical Functions

1. Task: Make motel, entertainment, and transportation arrangements

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1. PERFORMANCE OBJECTIVE

Given names and pending arrival time of guests, lodging directory, schedule of events, and transportation schedules, make motel, entertainment, and transportation arrangements for guests. All reservations must be arranged and confirmed prior to the arrival of the guests.

PERFORMANCE GUIDE

1. Determine the expected arrival times of the guests.
2. Determine visitor's requirements for special services.
3. Secure costs for ground transportation.
4. Secure costs for lodging in close proximity to destination.
5. Prepare a listing of special events, selected restaurants and featured places of interest.
6. Request visitor's preferences.
7. Confirm the itinerary with the visitors.
8. Make reservations for accommodations.
9. Submit typed itinerary to guests.

TOOLS AND EQUIPMENT

Names and pending arrival times of guests
Paper
Pencil
Calendar
Schedule of events
Brochures
Lodging directory
Transportation schedule
Computer terminal

A. Duty: Performing Clerical Functions

2. Task: Process telephone calls

---

2. PERFORMANCE OBJECTIVE

Given a telephone, paper, pencil, and resource materials, process telephone calls demonstrating correct business telephone etiquette and providing information according to company/organization guidelines.

PERFORMANCE GUIDE

1. Answer phone in courteous, polite manner.
2. Identify yourself by name and department.
3. Identify caller, company, and purpose.
4. Check in/out board to determine availability of party being called.
5. If person being called is not readily available, inform caller.
6. Take message if person being called is not available, obtaining all pertinent information. Verify name and phone number with caller.
7. If necessary to transfer call, locate appropriate number in internal phone directory.
8. Place caller on hold if necessary.
9. Initiate transfer call, inform person being called of incoming call. Stay on line until transfer is complete.
10. log telephone calls.

TOOLS AND EQUIPMENT

Telephone
Paper
Pencil
Resource materials

A. Duty: Performing Clerical Functions

3. Task: Process mail

---

3. PERFORMANCE OBJECTIVE

Given mail, date stamp, and incoming mail register, outgoing mail register, addressee information, process mail. Each piece of incoming mail must be opened, dated, and recorded without errors. All mail must be logged, sealed, and have correct address affixed.

PERFORMANCE GUIDE

1. Open all mail except those marked personal/confidential.
2. Prioritize mail.
3. Date stamp all mail.
4. Record mail in incoming register.
5. Place incoming register number on document.
6. Give mail to addressee.

TOOLS AND EQUIPMENT

Mail
Date stamp
Mail registers (incoming and outgoing)
Addressee information

A. Duty: Performing Clerical Functions

4. Task: Compose correspondence

---

4. PERFORMANCE OBJECTIVE

Given specified content information, compose correspondence. Correspondence must be free from confusion, easily understood, and without ambiguity and brief in form in compliance with office style.

PERFORMANCE GUIDE

1. Identify form of correspondence.
2. Identify purpose of correspondence.
3. Identify specific content.
4. Compose letter.
5. Edit written copy.
6. Type correspondence.
7. Proofread typewritten copy.
8. Make corrections as necessary.

TOOLS AND EQUIPMENT

Information
Paper
Pencil/pen
Computer (word processor)
Typewriter

A. Duty: Performing Clerical Functions

5. Task: Compile information for technical reports

---

5. PERFORMANCE OBJECTIVE

Given data information and data sources, compile information for technical reports. Data must be complete, accurate, and be recorded without errors.

PERFORMANCE GUIDE

1. Determine information to be charted.
2. Check data sources.
3. Secure any missing data.
4. Record data on charts.
5. Write narrative about data.
6. Proofread finished copy.
7. Make any necessary corrections.

TOOLS AND EQUIPMENT

Data
Information source list
Typewriter
Pen
Paper
Computer terminal

A. Duty: Performing Clerical Functions

6. Task: Maintain alphabetical, numerical, and subject file system

---

6. PERFORMANCE OBJECTIVE

Given materials to be filed and a log book, maintain alphabetical, numerical, and subject filing system. Files must be logged out and back in. Location of materials must be known and accessible according to organization or company policy.

PERFORMANCE GUIDE

1. Log files out.
2. Log files in.
3. Keep log.
4. Follow-up on items which are logged out.
5. Make sure files are secured or accessible depending on nature of materials at all times.
6. Determine keys are in custody of assigned personnel.

TOOLS AND EQUIPMENT

Files
Materials
Log books
Catalogs
Pen
Paper
Computer terminal

A. Duty: Performing Clerical Functions

7. Task: Maintain inventory of office supplies

---

7. PERFORMANCE OBJECTIVE

Given an inventory of supplies, order forms, and a log book for recording requisitions; maintain the inventory of office supplies so that adequate quantities are on hand at all times. Records must be kept as to the quantities consumed and costs incurred for each inventory item. (1)

PERFORMANCE GUIDE

1. Refer to requisition log for time required from date of requisition to receipt of order.
2. Compare quantities on hand with anticipated rate of use and the time required for delivery time so as to determine re-order point.
3. Complete requisition at the determined re-order point indicating quantity and description of items needed.
4. Keep file copy of requisition.
5. Enter name of supplier, requisition number, and date of requisition in log.
6. Forward requisition to purchasing department.
7. Verify completeness and accuracy of order upon receipt.
8. File a copy of invoice and record delivery date in log.
9. Forward invoice to purchasing department.
10. Store supplies for distribution.

TOOLS AND EQUIPMENT

Inventory
Order forms
Log book
Computer terminal
Pen
Paper
Calculator
Telephone

A. Duty: Performing Clerical Functions

8. Task: Maintain inventory of brochures/promotional material

---

8. PERFORMANCE OBJECTIVE

Given promotional brochures/materials, computer terminal, paper, inventory sheets, pen, pencil, and calculator, maintain inventory of brochures promotional materials. All materials are accurately counted.

PERFORMANCE GUIDE

1. Refer to requisition log for time required from date of requisition to receipt of order.
2. Compare quantities on hand with anticipated rate of use and the time required for delivery time so as to determine re-order point.
3. Complete requisition at the determined re-order point indicating quantity and description of items needed.
4. Keep file copy of requisition.
5. Enter name of supplier, requisition number, and date of requisition in log.
6. Forward requisition to purchasing department.
7. Verify completeness and accuracy of order upon receipt.
8. File a copy of invoice and record delivery date in log.
9. Forward invoice to purchasing department.
10. Store supplies for distribution.

TOOLS AND EQUIPMENT

Brochures
Promotional materials
Computer terminal
Paper
Inventory sheets
Pen/pencil
Calculator

A. Duty: Performing Clerical Functions

9. Task: Compose abstracts of articles and reports

---

9. PERFORMANCE OBJECTIVE

Given typewriter, word processor, paper, pen, and abstracts of articles and reports; abstract must summarize important points in clear and concise language; must not exceed one typewritten page; and must include source and page numbers of article or report from which it is taken.

PERFORMANCE GUIDE

1. Gather articles and reports.
2. Read material.
3. Outline important points.
4. Summarize important points.
5. Record source:
   a. Author
   b. Title of article/report
   c. Place of publication
   d. Publisher
   e. Date of publication
   f. Page number(s)

TOOLS AND EQUIPMENT

Paper
Pencil
Pen
Typewriter
Word processor/computer terminal
Reports
Articles

A. Duty: Performing Clerical Functions

10. Task: Duplicate material(s) on copying machine

---

10. PERFORMANCE OBJECTIVE

Given original materials and copy machine, duplicate material(s) on copying machine. Duplicates must be legible and all printed matter on original must be reproduced on copy.

PERFORMANCE GUIDE

1. Set machine for desired number of copies.
2. Check paper size and supply.
3. Insert original according to operating instructions on copy machine.
4. Print copy.
5. Check quality of copy.
6. Adjust light control indicator to darken or lighten copy, if necessary.
7. Reprint copy, if necessary.
8. Check copy.
9. Collect copies.
10. Collect original.

TOOLS AND EQUIPMENT

Copy machine
Materials

A. Duty: Performing Clerical Functions

11. Task:· Proofread typewritten copy

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11. PERFORMANCE OBJECTIVE

Given typewritten material, proofread typewritten copy. All errors in alignment, allotted space, transposition, spelling, punctuation, and sentence structure must be noted.

PERFORMANCE GUIDE

1. Examine copy noting typical typing errors (transpositions, spacing, etc.).
2. Examine copy for spelling and punctuation errors.
3. Verify dates, times, and other data.
4. Read copy for clarity.
5. Note any errors.
6. Return to originator for corrections or disposition.

TOOLS AND EQUIPMENT

Document
Pencil/pen

A. Duty: Performing Clerical Functions

12. Task: Type correspondence, forms, and reports

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12. PERFORMANCE OBJECTIVE

Given copy, data, and instructions, type correspondence, forms, and reports. The text must be typed in specified style and free of spelling and grammatical errors. All typewritten errors must be corrected.

PERFORMANCE GUIDE

1. Read copy.
2. Edit copy.
3. Read instructions for typing.
4. Type correspondence.
5. Proofread copy.
6. Make all necessary corrections.

TOOLS AND EQUIPMENT

Copy
Data
Forms
Typewriter
Computer terminal (word processing)

A. Duty: Performing Clerical Functions

13. Task: Complete forms

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13. PERFORMANCE OBJECTIVE

Given business or legal forms and information to complete, complete forms. Computations must be correct, items must be filled in according to data provided with no spelling or format errors.

PERFORMANCE GUIDE

1. Read copy.
2. Verify information (computations, data, etc.).
3. Edit copy.
4. Enter information onto the form.
5. Proofread finished copy.
6. Make all necessary corrections.

TOOLS AND EQUIPMENT

Forms
Typewriter
Pen
Pencil
Computer terminal

A. Duty: Performing Clerical Functions

14. Task: Schedule meetings

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14. PERFORMANCE OBJECTIVE

Given the need to schedule a meeting, telephone, meeting location, schedule a meeting that a quorum of membership will attend.

PERFORMANCE GUIDE

1. Establish date(s) for meeting.
2. Contact major participants to determine best date.
3. Reserve meeting place.
4. Notify those who should attend of date, location, times, and purpose.

TOOLS AND EQUIPMENT

Telephone
Meeting schedule
Location for meeting
Pen

A. Duty: Performing Clerical Functions

15. Task: Maintain an appointment and calendar system

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15. PERFORMANCE OBJECTIVE

Given appointments and cancellations to be made and an appointment calendar, maintain an appointment and calendar system. Appointments must not overlap, confirmations and/or cancellations should be made, and parties informed at least one day in advance.

PERFORMANCE GUIDE

1. Review calendar for previously scheduled obligations and/or commitments.
2. Make appointments for employer.
3. Record appointments and cancellations on employer's calendar.
4. Record appointments and cancellations on own calendar.
5. Confirm each appointment with other party involved.
6. Make cancellations when necessary and notify employer.
7. Remind employer of appointments.

TOOLS AND EQUIPMENT

Calendar
Computer
Pen

A. Duty: Performing Clerical Functions

16. Task: Use computer terminal and related programs

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16. PERFORMANCE OBJECTIVE

Given computer terminal and accessories, software program, and information to enter or receive, use computer and related programs according to software and company procedures/guidelines.

PERFORMANCE GUIDE

1. Gather information necessary.
2. Turn on system--inserting software, if necessary.
3. Enter data to computer.
4. Verify entry.
5. Close system.

TOOLS AND EQUIPMENT

Computer terminal
Software
Pen
Paper
Information/data

A. Duty: Performing Clerical Functions

17. Task: Stock brochure racks

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17. PERFORMANCE OBJECTIVE

Given brochures, promotional materials, and display racks, stock brochure racks. Rack is attractive, brochures are neatly arranged and easily removed one at a time.

PERFORMANCE GUIDE

1. Monitor brochure racks for low inventory.
2. Add brochures where necessary.
3. Straighten all brochures.

TOOLS AND EQUIPMENT

Brochures
Promotional materials
Display racks

A. Duty: Performing Clerical Functions

18. Task: Receive visitor(s)

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18. PERFORMANCE OBJECTIVE

Given visitor(s), receive visitor(s). Visitor(s) must be welcomed in a friendly manner, identified, and provided with accurate information.

PERFORMANCE GUIDE

1. Welcome visitor and obtain name and affiliation.
2. Identify person whom visitor wishes to see.
3. Ascertain availability of person to see visitor.
4. Direct or take visitor to destination according to office policy.

TOOLS AND EQUIPMENT

Brochures
Computer terminal
Pen
Maps
Paper

A. Duty: Performing Clerical Functions

19. Task: Explain fees

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19. PERFORMANCE OBJECTIVE

Given a fee schedule and a client/customer, explain the fees. Information given must be without error and given in a courteous manner.

PERFORMANCE GUIDE

1. Refer to the fixed schedule of fees for the various activities and services.
2. Explain itemized fees.
3. Display professional attitude toward client/customer:
   a. Be knowledgeable of fee schedule.
   b. Answer questions politely and with patience.
4. Refer the client/customer to management if fee explanation is unsatisfactory.

TOOLS AND EQUIPMENT

Fee schedule
Pen
Paper
Computer terminal
Calculator

A. Duty: Performing Clerical Functions

20. Task: Answer guests/client inquiries

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20. PERFORMANCE OBJECTIVE

Given an inquiry by guest or client, maps, brochures, and telephone, answer guests/clients inquiries pleasantly or refer to appropriate resource.

PERFORMANCE GUIDE

1. Greet guest/client.
2. Offer to help guest/client.
3. Respond to request by showing brochures and answering questions.
4. Give directions to guest/client.
5. Refer guest/client for information, if necessary.

TOOLS AND EQUIPMENT

Maps
Brochures
Telephone
Pen
Paper

B. Duty: Performing Public Relation Duties

1. Task: Develop and implement public relation programs

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21. PERFORMANCE OBJECTIVE

Given needs assessment, format, company/organization process, develop and implement a publication and program to improve the image and profitability of the company.

PERFORMANCE GUIDE

1. Analyze the market.
2. Establish the objectives of the program.
3. Prepare the program budget.
4. Plan a promotional activities calendar including:
   a. Regular merchandise promotional events
   b. Holiday/season-related promotional events
   c. Community/civic activities
   d. Possible new or specially priced merchandise
5. Write the promotional activities calendar:
   a. Date of promotional activity
   b. Type of activity
   c. Length of activity
6. Plan coordination of promotional program.
7. Implement program.
   a. Coordination of all promotional events
   b. Delegation of tasks to be carried out by employees

TOOLS AND EQUIPMENT

Computer
Company policies
Budget
Brochures
Telephone
Paper
Pencil
Posters

B. Duty: Performing Marketing Duties

2. Task: Establish client resource file and materials

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22. PERFORMANCE OBJECTIVE

Given form(s) and other supplies, tools and equipment, assemble/compile/activate records. A record folder will have been assembled/compiled/activated for clients without error according to department/facility policy/procedure.

PERFORMANCE GUIDE

1. Review department/facility policy procedures for assembling/compiling/activating client records.
2. Secure/obtain registration forms for clients.
3. Arrange registration forms in alphabetical/phonetic order.
4. Retrieve client's index cards from the client index card file.
5. Type information on index cards or enter information into the computer.
6. Stamp/type date of service on cards/or computer.
7. Prepare record folder.
8. Review contents and information on folders for completeness.

TOOLS AND EQUIPMENT

Accession logs/ledgers/registries
Consultation reports
Date stamp
Department/facility policy/ procedures
Record folders
Number control index
Client index cards
Client index file (card file) drawer, automated, mechanical
Client histories
Registration form (face summary sheet)
Typewriter with desk and chair
Computer

B. Duty: Performing Public Relation Duties (Marketing)

3. Task: Establish marketing and promotional programs

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23. PERFORMANCE OBJECTIVE

Given a list of the promotional goals for the business, a list of promotional activities, and their cost, establish promotional program. Program must address advertising, displays, and public relations, and meet organization's goals.

PERFORMANCE GUIDE

1. Analyze the market.
2. Establish the objectives of the program.
3. Prepare the program budget.
4. Plan a promotional activities calendar including:
   a. Regular merchandise promotional events
   b. Holiday/season-related promotional events
   c. Community/civic activities
5. Write the promotional activities calendar:
   a. Date of promotional activity
   b. Type of activity
   c. Length of activity
6. Plan coordination of promotional program.

TOOLS AND EQUIPMENT

Organization's goals
Paper
Pencil
Telephone
Computer terminal
Brochures
Listing of specialized services

B. Duty: Performing Public Relation Duties (Marketing)

4. Task: Deal effectively with individuals and groups in a courteous and tactful manner

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24. PERFORMANCE OBJECTIVE

Given a public relations policy and organizational orientation, deal effectively with individuals and groups in a courteous and tactful manner.

PERFORMANCE GUIDE

1. Greet individuals.
2. Provide adequate information.
3. Speak loudly and clearly.
4. Respond to questions and comments according to company/agency policy.

TOOLS AND EQUIPMENT

Company/organization policies

B. Duty: Performing Public Relation Duties

5. Task: Draft/edit monthly newsletter

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25. PERFORMANCE OBJECTIVE

Given news items, paper, pencil, word processor, typewriter, draft/edit monthly newsletter. Newsletter is clear, provides adequate coverage, and is free of error.

PERFORMANCE GUIDE

1. Assemble equipment.
2. Assemble news items.
3. Edit news items submitted.
4. Type news items in appropriate format.
5. Lay out format of newsletter.
6. Assemble all articles.
7. Review newsletter.
8. Edit newsletter.
9. Prepare and send for printing.

TOOLS AND EQUIPMENT

News items
Paper
Pencil
Word processor
Typewriter

B. Duty: Performing Public Relation Duties

6. Task: Convey information orally

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26. PERFORMANCE OBJECTIVE

Given groups or individuals a variety of formal or informal settings, convey geographical related information in a clear and concise manner.

PERFORMANCE GUIDE

1. Speak to assembled group loudly and clearly.
2. Emphasize points using audiovisual equipment.
3. Explain brochures.
4. Explain maps clearly and concisely.

TOOLS AND EQUIPMENT

Audiovisual materials
Audiovisual equipment
Brochures
Maps
Microphone

B. Duty: Performing Public Relation Duties (Marketing)

7. Task: Write and distribute news media releases

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27. PERFORMANCE OBJECTIVE

Given news item, paper, pencil, newspaper requirements, word processor, and newspaper directory, write and distribute news media releases in format that meets newspaper and organization requirements.

PERFORMANCE GUIDE

1. Draft news items.
2. Secure approval.
3. Type final version.
4. Distribute to appropriate sources.

TOOLS AND EQUIPMENT

News item
Paper
Pencil
Newspaper directory
Word processor

B. Duty: Performing Public Relation Duties (Marketing)

8. Task: Work with tourism related and promotional projects

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28. PERFORMANCE OBJECTIVE

Given calendar, schedule of events, projects and activities, paper, pencil, telephone work with tourism related and promotional projects/events according to organization's guidelines and policies.

PERFORMANCE GUIDE

1. Receive request for assistance for activity.
2. Identify nature, scope, and purpose of the activity.
3. Review request to determine whether it meets company policy and legal liabilities.
4. Meet with the leader, organizer, or sponsor of the activity to explain company policies.
5. Cooperate without interrupting business.
6. Inform employees about the activity.
7. Assess that all company policies have been followed.

TOOLS AND EQUIPMENT

Events schedule
Project schedule
Activity list
Paper
Pencil
Telephone
Calendar

B. Duty: Performing Public Relation Duties (Marketing)

9. Task: Manage production of all brochures

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29. PERFORMANCE OBJECTIVE

Given budget, final proof of brochure, paper, calendar, printer, contracted services, and computer terminal, manage production of all brochures according to organizational guidelines and budget.

PERFORMANCE GUIDE

1. Proof brochure.
2. Prepare department requisition to determine type and amount to order.
3. Fill out a purchase order form using:
   a. Vendor's name and address
   b. Store name and address
   c. Department identification
   d. Type and amount of brochure
   e. Requested shipping and delivery date
   f. Method of delivery
   g. Special instructions
4. Obtain approval for each order.
5. Mail or telephone completed order to vendor.
6. Evaluate good and bad examples of brochures and promotional material.

TOOLS AND EQUIPMENT

Budget
Brochure proof
Contract services/directory
Calendar
Printer
Paper
Computer terminal

B. Duty: Performing Public Relation Duties (Marketing)

10. Task: Coordinate with local and regional campaigns and services

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30. PERFORMANCE OBJECTIVE

Given local campaigns, calendar, services directory, telephone book, paper, pen, and computer terminal, coordinate with local and regional campaigns and services according to organization's policies, budget, and guidelines.

PERFORMANCE GUIDE

1. Receive request for assistance for activity.
2. Identify nature, scope, and purpose of the activity.
3. Review request to determine whether it meets company policy and legal liabilities.
4. Meet with the leader, organizer, or sponsor of the activity to explain company policies.
5. Cooperate without interrupting business.
6. Inform employees about the activity.
7. Assess that all company policies have been followed.

TOOLS AND EQUIPMENT

Calendar
Services directory
Telephone book
Paper
Pen
Computer terminal

B. Duty: Performing Public Relation Duties (Marketing)

11. Task: Coordinate tours

---

31. PERFORMANCE OBJECTIVE

Given tour plan, visitors, directory of sites and services, telephone, paper and pen, coordinate tours according to predetermined plan that meets organization's and clients' needs.

PERFORMANCE GUIDE

1. Determine which attractions/activities to include from the area inventory. Look for variety.
2. Determine the budget for the tour.
3. Allocate time for lunches, for a.m. activities, for p.m. activities.
4. Allocate time for travel.
5. Prepare agenda with ETD, travel time, attractions/activities, meals, breaks, ETR.
6. Determine net cost for each element.
7. Total net cost for tour. Include mark-up for fixed cost (labor, insurance, promotion, etc.).
8. Mark-up for profit. Adjust if necessary to reflect budget.
9. Calculate cost/person based upon bread even point.
10. Review itinerary with tour operator and driver.
11. Print itinerary, agenda of tour.
12. Distribute to guest.
13. Reconfirm with each attraction activity, restaurant, and transportation.
14. Introduce yourself to guest, review with them the agenda for the day, outline some of the variables.
15. During the tour, make an effort to make a one to one connection with each guest.
16. Point out personal interest stories.
17. At conclusion, thank them all and then individually for joining you.

TOOLS AND EQUIPMENT

Tour plan
Directory of sites and services
Telephone
Paper
Pen

B. Duty: Performing Public Relation Duties (Marketing)

12. Task: Develop information kit

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32. PERFORMANCE OBJECTIVE

Given brochures, folders, promotional materials, maps, and business cards, develop information kit, providing complete information on services and facilities.

PERFORMANCE GUIDE

1. Review all literature.
2. Review policies of agency/establishment.
3. Assemble relevant information items.
4. Arrange in neat manner.
5. Put in company folder.

TOOLS AND EQUIPMENT

Brochures
Folders
Promotional materials
Maps
Business cards

B. Duty: Performing Public Relation Duties

13. Task: Establish working relationship with tour operators

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33. PERFORMANCE OBJECTIVE

Given list of tour operators, paper, pen, word processor, telephone, and service directory, establish working relationship with tour operators within organization's guidelines and maintaining regular contact.

PERFORMANCE GUIDE

1. Review organization's guidelines and goals in establishing working relationships with tour operators.
2. Review list of tour operators to determine which ones are appropriate under organization's guidelines and goals.
3. Write introductory letter to tour operator outlining organization's goals, indicating when you will phone to follow-up initial contact.
4. Make note in tickler file of when to follow up initial contact.
5. Make follow-up phone call.
6. Write report on results of follow-up phone call.
7. Review contact results.
8. Through review of results, determine tour operators which warrant ongoing relationships.
9. Make files on tour operators and follow-up with any information they may have required.
10. Establish a schedule of contacts for future follow-ups.

TOOLS AND EQUIPMENT

Listing of tour operators
Paper
Pen
Word processor
Telephone
Service director
File folders
File labels

C. Duty: Performing Sales Functions

1. Task: Manage promotional programs

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34. PERFORMANCE OBJECTIVE

Given a promotional activity, promotional plan, telephone, staffing schedules, brochures, manage promotional programs according to organization's guidelines.

PERFORMANCE GUIDE

1. Analyze the promotional goals, activities calendar, and budget.
2. Write a checklist for carrying out each promotional activity.
   a. Merchandise/civic activity to be promoted
   b. Theme
   c. Location
   d. Materials and media
   e. Beginning preparations
   f. Deadlines for various stages of preparation
   g. Costs
3. Implement the stages of promotional program including:
   a. coordination of all promotional events
   b. Delegation of tasks to be carried out by employees

TOOLS AND EQUIPMENT

Telephone
Promotional plan
Brochures
Staffing schedule

C. Duty: Performing Sales Functions

2. Task: Promote/sell conferences/conventions

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35. PERFORMANCE OBJECTIVE

Given a convention booking situation, a property's banquet function book, brochures, reservation cards, pen, and calculator, promote/sell conventions/conferences. Properly booked convention arrangements must include date, time, number of people and rooms, prices, "set-up," and person's name/address/telephone booking convention.

PERFORMANCE GUIDE

1. Establish quality sales prices.
2. Target market.
3. Conduct direct sales campaigns.
4. Conduct sales blitzes.
5. Direct mail campaigns.
6. Follow up leads with telephone calls.
7. Establish evaluation technique for each method.
8. Evaluate/measure results of each method used.

TOOLS AND EQUIPMENT

Function record
Brochures
Calendar
Reservation cards
Company policies/procedures
Calculator
Computer terminal
Pencil/pen
Company forms

C. Duty: Performing Sales Functions

3. Task: Develop convention services

---

36. PERFORMANCE OBJECTIVE

Given paper, pencil, computer terminal, software, listing of convention sites/facilities, local services, develop convention services to reduce duplication and increase convention sales according to organization's policies.

PERFORMANCE GUIDE

1. Develop convention planning guides which includes services such as:

   a. Registration help
   b. Registration packets
   c. Nametags
   d. Social events
   e. Spouse tours (organize, set-up registration, guide tours)
   f. Guest speakers
   g. Special receptions
   h. Welcome from chamber/mayor
   i. Conference scheduling
   j. Working with hotels visitor bureaus.

TOOLS AND EQUIPMENT

Paper
Pen/pencil
Computer terminal software
Facilities directory
Service directory

C. Duty: Performing Sales Functions

4. Task: Promote new account interest

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37. PERFORMANCE OBJECTIVE

Given knowledge of business, clientele, industry, printer, photographer, budget allocation, promote new account interests. Sales plan must meet company quotas and be made according to company policies.

PERFORMANCE GUIDE

1. Review budget allocation available for sales.
2. With the assistance of professionals (photographer, printer, advertising agency) as may be required, promote image that company wants to project.
3. Package sales information:
   a. Name of business
   b. Address/phone number
   c. Logo
   d. Pictures
   e. Any other pertinent data
4. Select contents of presentation folder including facilities and services.

TOOLS AND EQUIPMENT

Knowledge of business and clientele to be served
Photographer
Printer
Budget allocation
Paper
Pencil/pen
Typewriter
Company policies

C. Duty: Performing Sales Functions

5. Task: Write bid proposals and invitations

---

38. PERFORMANCE OBJECTIVE

Given schedule of events, client specifications, facilities directory, paper, pencil (pen), word processor, services directory, organization's policies, write bid proposals and invitations meeting needs of client and organization's policies and goals.

PERFORMANCE GUIDE

1. Assess client's event needs.
2. Stipulating client specifications, write a Request for Proposal (RFP) in accordance with organization's policies.
3. Match client specifications to facilities available as listed in facilities directory.
4. Write to selected facilities, inviting their response to the RFP.
5. Send invitations and bid proposals.

TOOLS AND EQUIPMENT

Schedule of events
Client specifications
Facilities directory
Service Director
Paper
Pencil/pen
Word processor
Telephone

C. Duty: Performing Sales Functions

6. Task: Present bid proposal

---

39. PERFORMANCE OBJECTIVE

Given bid proposal and supplementary materials, present bid proposal responding efficiently and concisely to all questions in a clear voice.

PERFORMANCE GUIDE

1. Following proper hygiene procedures and wearing suitable attire, prepare for public speaking presentation.
2. Gather bid proposal, brochures, flipcharts, overhead projector, and other supplementary materials for review prior to presentation.
3. On the day of presentation, arrive early, mentally and physically prepared for presentation.
4. Verify that all equipment and supplementary materials are available and operative.
5. Greet and seat clients and put them at their ease before presentation.
6. Make presentation, responding efficiently to all questions in a clear voice.
7. Make note of any questions which require further research.
8. Upon completion of presentation, thank clients for their time and attention.
9. Make appointments for follow-up action.
10. Gather materials and vacate presentation area.
11. Re-file information in complete and accurate order.

TOOLS AND EQUIPMENT

Bid proposal
Brochures
Overhead projector
Flipchart
Typewriter/Word processor
File folders
File labels

C. Duty: Performing Sales Functions

7. Task: Collect bid proposals and invitations

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40. PERFORMANCE OBJECTIVE

Given bid proposals from several facilities for an event, collect bid proposals and invitations according to organization's guidelines and directions.

PERFORMANCE GUIDE

1. Collect mail from mailroom.
2. Collect file folders and file labels.
3. Open bid proposals.
4. Stamp date of receipt on proposal.
5. Check bid proposals for correct and complete response to invitation.
6. Create files for each bid proposal according to organization's guidelines and directions.

TOOLS AND EQUIPMENT

Bid proposals
Date stamp
Typewriter/Word processor
File folders
File labels

C. Duty: Performing Sales Functions

8. Task: Reserve cars for future rental

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41. PERFORMANCE OBJECTIVE

Given a customer request, computer terminal, pen, reservation sheet, reserve cars for future rental. Date, time, guaranteed rate are recorded accurately.

PERFORMANCE GUIDE

1. Examine customer request:
   Note:
   a. Client name, address, and method of contact.
   b. Date and time of pick up.
   c. Duration of rental.
   d. Date and time of return.
   e. Pick-up and drop-off points.
   f. Vehicle type--accessories.
   g. Rate basis; i.e., business or leisure
   h. Method of payment.
2. Contact rental agency.
3. Provide rental agency with pertinent information.
4. Receive a guaranteed rate.
5. Receive a confirmation number.
6. Have rental agency repeat information to verify accuracy.
7. Confirm reservation with client.

TOOLS AND EQUIPMENT

Computer terminal
Pen
Reservation sheet
Rate listing
Telephone/telex

C. Duty: Performing Sales Functions

9. Task: Handle/process customer complaints

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42. PERFORMANCE OBJECTIVE

Given the task of mediating disputes, handle/process customer complaints according to company policy.

PERFORMANCE GUIDE

1. Listen carefully to complaint.
2. Restate complaint and have customer confirm it.
3. Express regret and make every effort to make adjustment to satisfy customer.
4. If request must be refused, explain why.
5. Apologize for any situation for which company is at fault and thank customer for bringing it to your attention.
6. Refer difficult complaints to management.
7. Role playing simulation.

TOOLS AND EQUIPMENT

Telephone
Paper
Pencil
Company policies/procedures

C. Duty: Performing Sales Functions

10. Task: Solve reservation problems

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43. PERFORMANCE OBJECTIVE

Given reservation problem, forms, pen, telephone, solve reservation problems according to company procedures.

PERFORMANCE GUIDE

1. Determine nature of reservation problems. Use diplomacy in dealing with client.
2. Review company procedure for resolving specific reservation problems.
3. Resolve reservation problems according to company policy.

Note: Various reservation problems can be encountered. Each aspect of the tourism industry would have different procedures for resolving reservations problems; i.e., travel agent with supplier, client with supplier, travel agent with client. For more detailed performance guidance, the nature of the reservation problem would have to be more specific.

TOOLS AND EQUIPMENT

Forms
Pen
Telephone

C. Duty: Performing Sales Functions

11. Task: Assist local establishments with convention bids

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44. PERFORMANCE OBJECTIVE

Given organization requesting convention bids, telephone and establishment's desire to prepare a bid, assist local establishment with convention bids according to Board policy.

PERFORMANCE GUIDE

1. Gather information about specific convention.
2. Gather specific information on:

    a. Property
    b. Space needed (exhibit, breakout rooms, bleeping rooms, prices)

3. Identify how bid is to be presented.
4. Assist in preparation of bid.

TOOLS AND EQUIPMENT

Telephone
Calculator
Paper
Pencil
Computer terminal

C. Duty: Performing Sales Functions

12. Task: Erect/arrange exhibits and displays

---

45. PERFORMANCE OBJECTIVE

Given a situation requiring promotional displays and exhibits, plan advertising and plan public relations. Erect/arrange displays and exhibits. Promotional displays and exhibits must be arranged fulfilling contractual agreements which stipulate the type of displays and exhibits that must be developed.

PERFORMANCE GUIDE

1. Write a plan for the display:
   a. Theme or purpose
   b. Merchandise to be promoted
   c. Consider store layout and flow of customer traffic
   d. Display accessories
   e. Signs to be used
   f. Tools and supplies to be used
2. Sketch the display.
3. Letter or order signs.
4. Assemble props, merchandise, tools and supplies.
5. Clean the display area.
6. Build the display incorporating the following principles:
   a. Balance
   b. Harmony
   c. Color and texture
   d. Proportion
   e. Shape
   f. Focal area
   g. Unity
7. Incorporate the following safety practices:
   a. Shelves, racks, props are adequately braced and wide enough to support displayed merchandise.
   b. Stacked displays of merchandise are build firmly and neatly. Round objects are stacked on end and a flat piece of material (corrugated, board, etc.) is placed on top of each row before placing others above them. Bags are stacked with the mouth of the bag on the inside of the stack.
   c. All electrical equipment is placed out of customer's way.
   d. Use only fire-resistant accessory materials.
   e. Do not place display in an area that will block exits or entrances.
   f. Avoid sharp edges or corners in the display.

C. Duty: Performing Sales Functions

12. Task: Erect/arrange exhibits and displays

(Continued)

8. Set up a display which:
   a. Avoids false impression of the merchandise.
   b. Has only fresh and clean merchandise, props, and accessories.
   c. Has a theme or purpose.
   d. Includes signs that are free of errors, are clean, and identify the merchandise and its price.
   e. Has merchandise that is easy to reach.
9. Check the display and make any adjustments needed.
10. Dispose of all debris.
11. Return tools and materials to storage area.

TOOLS AND EQUIPMENT

Advertising tools
Public relations tools
Contracts
Pen/pencil
Paper
Calendar
Tables
Table cloth
Hammer/screw driver

C. Duty: Performing Sales Functions

13. Task: Conduct site tours

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46. PERFORMANCE OBJECTIVE

Given convention client, map, brochures, and automobile, conduct site tours showing potential client all sites as predetermined to meet community and convention goers needs.

PERFORMANCE GUIDE

1. Identify purpose.
2. Identify target market:

    a. Convention/meeting planners
    b. Hotel/resort developers
    c. Attraction developers

3. Identify type of facility property required:

    a. Number of people
    b. Type of food
    c. Services
    d. Transportation
    e. Meeting rooms and breakout rooms

4. Be aware of other services needed, such as sites for social events and spouse tours.

TOOLS AND EQUIPMENT

Map
Brochures
Automobile

D. Duty: Performing Inspection and Maintenance

1. Task: Fill gas tanks

---

47. PERFORMANCE OBJECTIVE

Provided cloth, flashlight, fuel, fill gas tanks. Fuel must be at the full marker and cap securely replaced.

PERFORMANCE GUIDE

1. Turn off engine.
2. Extinguish all cigarettes and other flames before fueling.
3. Fuel tank to capacity.
4. Replace cap securely.

TOOLS AND EQUIPMENT

Clean cloth
Flashlight
Fuel

D. Duty: Performing Inspection and Maintenance

2. Task: Service vehicles

---

48. PERFORMANCE OBJECTIVE

Given motorized vehicles, wrenches, auto tool kit, and oil, check safety of vehicles and service vehicles according to vehicle manufacturer and company policy and standards.

PERFORMANCE GUIDE

1. Obtain vehicle maintenance procedures and form.
2. Gather necessary tools and equipment.
3. Visually inspect vehicle for physical damage and fluid leaks.
4. Perform required inspection and service functions, following maintenance procedures.
5. Verify that all requirements have been satisfactorily completed.
6. Clean work area and replace tools and equipment to proper place.
7. Report to maintenance manager and file maintenance forms.

TOOLS AND EQUIPMENT

Vehicle manufacturer's manuals
Auto tool kits
Oil/oil filters
Fan belts

E. Duty: Performing Personnel Functions

1. Task: Write a job description

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49. PERFORMANCE OBJECTIVE

Given duties to be performed and other required information, write a job description. Qualifications, degrees, credentials, certificates, or special training required of worker, duties to be performed, typical tasks associated with each duty, level of performance expected, and any physiological, psychological or environmental constraints associated with job must be described.

PERFORMANCE GUIDE

1. Make a list of typical tasks and performance levels associated with the job.
2. Identify tasks with critical levels of performance.
3. Identify tasks involving health or safety concerns.
4. Categorize the tasks within appropriate duty areas.
5. Characterize the typical tasks and expected levels of performance so as to convey the general nature of the work together with the required qualifications.
6. Arrange job description into the prescribed format.
7. Review for clarity, completeness, and accuracy.
8. Revise, as necessary.

TOOLS AND EQUIPMENT

Job classifications
List of duties
Paper
Pencil
Computer terminal

E. Duty: Performing Personnel Functions

2. Task: Orient new employees/volunteers

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50. PERFORMANCE OBJECTIVE

Given specific company regulations, an outline of duties and tasks required of the position, and the arrival of a new employee; orient the new employee or volunteer to the regulations and policies so that the new employee/volunteer knows what is expected of him/her and what he/she may expect of the employer.

PERFORMANCE GUIDE

1. Greet the new employee.
2. Make introductions.
3. Discuss office regulations and employee responsibilities concerning such items as the chain of supervision, completion of timesheets, maintenance of security, compliance with personnel department's processing procedures, and the receipt of employee benefits.
4. Outline specific duties and typical tasks associated with the position.
5. Answer any specific questions from new employee.

TOOLS AND EQUIPMENT

Company regulations
Job descriptions

E. Duty: Performing Personnel Functions

3. Task: Plan physical layout of office

---

51. PERFORMANCE OBJECTIVE

Given dimensions and physical features of an office, list of employees, list of furniture and equipment required, general traffic patterns, and anticipated work flow, plan physical layout of office.

PERFORMANCE GUIDE

1. Make scale diagram of space.
2. Review traffic patterns, work flow characteristics and electrical/telephone features.
3. Prepare cut-outs of office furniture and equipment to scale.
4. Arrange cut-outs on the scale diagram.
5. Indicate electrical/telephone features.
6. Indicate traffic patterns and work areas.
7. Rearrange cut-outs where necessary in order to avoid competing space utilization.

TOOLS AND EQUIPMENT

Dimensions and physical features of an office
List of employees
List of furniture and equipment required
General traffic patterns
Anticipated work flow
Paper
Pencil
Blueprints
Ruler

E. Duty: Performing Personnel Functions

4. Task: Update office manual or instruction book for employees/ volunteers

---

52. PERFORMANCE OBJECTIVE

Given office manual or employee instruction book, amendments, recommended changes and/or additions, update office manual or instruction book for employees/volunteers. Manual must incorporate latest revisions.

PERFORMANCE GUIDE

1. Review the format and contents of the existing manual.
2. Insert amendments initiated through company directives.
3. Analyze user-recommended changes and additions to the manual.
4. Append those user-recommended changes/additions which appear valid.
5. Modify table of organization to reflect changes.
6. Circulate rough draft for comments/editing.
7. Incorporate revisions in final draft.

TOOLS AND EQUIPMENT

Office manual or employee instruction book
Amendments to company directives and policies
Recommended change and/or additions

E. Duty: Performing Personnel Functions

5. Task: Recruit/interview personnel

---

53. PERFORMANCE OBJECTIVE

Given an employee application and pen, interview a prospective employee/ volunteer. Interview questions must be performance oriented and within company, federal, and state guidelines.

PERFORMANCE GUIDE

1. Formulate specific information sought during interview.
   a. Compile list of documents required including social security card.
   b. Compile information from resume.
2. Review application forms.
3. Schedule interview.
4. Open the interview by putting the applicant at ease.
5. Give applicant requested or required job information including job demands, requirements, and benefits.
6. Ask for required personal information including applicant's experience, education, and training.
   a. Ask open-ended questions in order to allow the applicant to reveal information.
   b. Open interview for applicant's questions.
7. Arrange for required preemployment tests.
8. Arrange for required associate interview.
9. Close interview with exit interview comments.
10. Document and make recommendation for employment, follow-up, or nonemployment.

TOOLS AND EQUIPMENT

Employee applications
Pen
List of interview questions

E. Duty: Performing Personnel Functions

6. Task: Make work assignments

---

54. PERFORMANCE OBJECTIVE

Given tasks to be performed, criteria for prioritization, current workloads, department production capabilities, make work assignments.

PERFORMANCE GUIDE

1. Determine the time required for task completion and dates desired for each new task.
2. Review work requests on a daily basis to estimate the total volume of work in each priority status: immediate, end-of-day, or end-of-week.
3. Allot work equitably.
4. Prioritize work, redistributing as needed, to minimize delays while maintaining equity of workload.
5. Revise schedule daily to accommodate "immediate" and "end-of-day" status work requests.

TOOLS AND EQUIPMENT

Tasks to be performed
Criteria for prioritization
Current workloads
Departmental production capabilities
Paper
Pencil
Computer terminal

E. Duty: Performing Personnel Functions

7. Task: Conduct employee performance evaluation

---

55. PERFORMANCE OBJECTIVE

Given an employee's personnel file and a job description manual, conduct an employee performance evaluation. Evaluation must be conducted objectively and according to company policies.

PERFORMANCE GUIDE

1. Set up employee evaluation schedule and notify employees.
2. Using a standard employee evaluation form, observe employee performance and evaluate employee.
3. Review employee's performance record with employer criteria.
4. Conduct individual employee conferences.
5. Review evaluation results with the employee.
6. Evaluate employee's reactions.
7. Establish goals for improvement.
8. Document employee conference.
9. Evaluate employee performance.
10. If no improvement observed, issue an official warning to the employee.
11. Document observations.

TOOLS AND EQUIPMENT

Employee's personnel file
Job description manual
Pen/pencil
Paper

E. Duty: Performing Personnel Functions

8. Task: Provide employees/volunteers with support materials

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56. PERFORMANCE OBJECTIVE

Given personnel manual, procedures manual, travel brochures, schedules, directories, applicable forms, pencil, pen, provide employees/volunteers with support materials so that employees/volunteers have all information and materials to carry out duties and tasks of their position.

PERFORMANCE GUIDE

1. Evaluate needs of employees/volunteers.
2. Compile relevant information items.
3. Provide supplies to employee/volunteers.
4. Notify employee/volunteer of policy for obtaining supplies.

TOOLS AND EQUIPMENT

Personnel manual
Procedures manual
Computer terminal
Brochures
Schedules
Directories
Forms
Paper
Pencil
Office supplies

E. Duty: Performing Personnel Functions

9. Task: Develop employee/volunteer communication programs and skills

---

57. PERFORMANCE OBJECTIVE

Given employees/volunteers, a person responsible for training who is knowledgeable about business objectives and communication skills and room/materials, develop employee communication programs and skills. Training must be conducted which meets training objectives of business and which is consistent with communication needs of company.

PERFORMANCE GUIDE

1. Establish a training environment; i.e., classroom.
2. Provide trainer with necessary supplemental materials; i.e., company policies, procedures, and audio-visual materials.
3. Introduce the trainer as one who is knowledgeable about the business objectives and proficient in communication skills training.
4. Communicate goals and objectives of the business to trainees.
5. Initiate trainees into company philosophy, goals, and objectives.
6. Provide support and opportunities for trainees to use and practice the skills which the company desires.
7. Evaluation and continued support services and ongoing educational opportunities for trainees.
8. Opportunity for trainees to offer feedback and evaluation of total program.

TOOLS AND EQUIPMENT

Company policies
Overhead projector
Audio visual
Paper
Pen
Flipchart
Blackboard

E. Duty: Performing Personnel Functions

10. Task: Supervise employees/volunteers

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58. PERFORMANCE OBJECTIVE

Given a list of employees and their areas of capabilities, tools and equipment, supervise employees/volunteers. The assignments must be based on employee/volunteer capabilities, company functions and goals, and must accomplish work schedules in accordance with company policy/procedures.

PERFORMANCE GUIDE

1. Review company policy/procedures regarding employee responsibility.
2. Review:
    a. Job descriptions
    b. Employee files
    c. Performance goals
    d. Work schedules
    e. Pay scale and benefits
3. Analyze and list:
    a. Routine tasks on regular basis (example: preventive maintenance
    b. Match responsibilities to job description:
        (1) Routine
        (2) Preventive
        (3) Emergency
4. Discuss responsibilities with employees.
5. Make responsibility list for file and copy to employee.

TOOLS AND EQUIPMENT

Company policy/procedures
Company organizational chart
Personnel files
Work schedules
Company functions and goals
Property management reference/text
Performance goals
Employee list

F. Duty: Performing General Managerial Duties

1. Task: Write periodic reports

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59. PERFORMANCE OBJECTIVE

Given relevant content information, report format and guidelines, write a periodic report. The report must contain all requested data, be formatted in accordance with guidelines and conform to standard rules of grammar and spelling. The report must be approved and accepted according to organization/company policy/procedures.

PERFORMANCE GUIDE

1. Review the type of report to be written.
2. Obtain information to be included.
3. Check data for accuracy.
4. Write (draft) report.
5. Edit report.
6. Obtain supervisor's initials.

TOOLS AND EQUIPMENT

Paper
Pencil/pen
Computer terminal (word processor)
Information
Report format guidelines

F. Duty: Performing General Managerial Duties

2. Task: Attend professional trade shows

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60. PERFORMANCE OBJECTIVE

Given scheduled trade show and financial support, attend professional trade show according to organization's guidelines.

PERFORMANCE GUIDE

1. Become aware of trade shows in marketing target area.
2. Evaluate success of each trade show regarding cost, timing, etc.
3. Develop display.
4. Develop method to measure results at show.
5. Network with people in business; i.e., bureaus, hotels, airlines, resorts to learn about different shows.

TOOLS AND EQUIPMENT

None

F. Duty: Performing General Managerial Duties

3. Task: Develop agendas for board meetings

---

61. PERFORMANCE OBJECTIVE

Given scheduled board meeting, paper, timelines, pen, computer terminal, and list of topics, develop agendas for board meetings. Topics are scheduled within time frame of meeting, clearly stated, and adequate time is allotted for each topic.

PERFORMANCE GUIDE

1. State objectives of meeting.
2. Solicit issues to be discussed from board members.
3. Review previous agendas.
4. Schedule topics within time frame of meeting.
5. Draft agenda.
6. Submit for review and approval.
7. Type final copy.

TOOLS AND EQUIPMENT

Paper
Pen/pencil
Computer terminal
List of topics
Schedule

F. Duty: Performing General Managerial Duties

4. Task: Maintain tickler file

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62. PERFORMANCE OBJECTIVE

Given materials/information to be retrieved/filed, tools and equipment, maintain tickler file. Materials/information to be retrieved/filed from a tickler filing system must be completed in accordance with organization/ facility policy/procedures.

PERFORMANCE GUIDE

1. Obtain filing equipment.
2. Prepare file folder(s) or index card(s):
   a. Type labels for file folder corner(s):
      (1) Type date(s)
      (2) Type month(s)
      (3) Type year(s)
      (4) Type days of week
      (5) Type times
   b. Place labels on corners of file folder(s).
   c. Place colored file flags on folder(s) or index card(s) when labels are not used.
      (1) Place different colored flags on edge of file(s) or index card(s) to represent specific dates, months, years, days, or times.
      (2) Record on record sheet what is represented by each different colored flag.
3. Insert information into file folders or record information onto index card(s).
4. File the folders or index cards according to filing system specified by department/facility policy/procedures.
5. Pull the file when specified to retrieve information according to department/ facility policy/procedures:
   a. Obtain colored flag record sheet to retrieve appropriate information.

TOOLS AND EQUIPMENT

File folders
Labels
colored file flags
File dividers
Index cards
File cabinet
Typewriter
Word processor

F. Duty: Performing General Managerial Duties

4. Task: Maintain tickler file

(Continued)

Pen/pencil
Record sheet
Stamp
Paper clips
Staple remover

F. Duty: Performing General Managerial Duties

5. Task: Evaluate programs

---

63. PERFORMANCE OBJECTIVE

Given program data, organization goals, activity records, and cost data, evaluate programs. A report is written which demonstrates progress according to organization guidelines.

PERFORMANCE GUIDE

1. Review organizational goals and guidelines for program.
2. Review program data, activity records, and cost data.
3. Evaluate program data and activity records by expense report.
4. Evaluate cost effectiveness of program.
5. Determine program effectiveness according to organizational guidelines.
6. Prepare written report incorporating recommendations for future programs.

TOOLS AND EQUIPMENT

Program data
Computer terminal
Activity records
Budget
Expense report
Paper
Pencil
Organization goals
Calculator

F. Duty: Performing General Managerial Duties

6. Task: Prepare performance report

---

64. PERFORMANCE OBJECTIVE

Given record of activities, accomplishments and pre-specified data, prepare performance report according to organization's guidelines and predetermined format. Report is accurate and grammatically correct.

PERFORMANCE GUIDE

1. Review organization's guidelines and predetermined format.
2. Review prespecified data.
3. Review record of activities and accomplishments.
4. Compare activities and accomplishments to prespecified data.
5. Inject comparison results into predetermined format.
6. Compare goals and guidelines of organization to #5.
7. Prepare performance report acknowledging record of activities and accomplishments.
8. Write performance report, evaluating success based on organization's goals, incorporating recommendations for the future.

TOOLS AND EQUIPMENT

Record of activities
Record of accomplishments
Data
Pencil
Paper
Word processor

F. Duty: Performing General Managerial Duties

7. Task: Attend Board of Directors Meetings

---

65. PERFORMANCE OBJECTIVE

Given scheduled board meeting, attend board meeting maintaining a professional image and speaking clearly.

PERFORMANCE GUIDE

1. Prepare items for board meeting.
2. Arrive at meeting location early.
3. Greet board members.
4. Speak clearly when requested.

TOOLS AND EQUIPMENT

None

F. Duty: Performing General Managerial Duties

8. Task: Act as liaison with local merchants/groups

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66. PERFORMANCE OBJECTIVE

Given a retail situation, local merchants and business groups act as a liaison with local merchants/groups. Regular two-way communication is conducted according to company policy.

PERFORMANCE GUIDE

1. Research local merchant listing.
2. Obtain listing of groups.
3. Notify merchants and groups of services.
4. Attend local civic meetings.
5. Maintain contact.

TOOLS AND EQUIPMENT

None.

F. Duty: Performing General Managerial Duties

9. Task: Authorize brochure displays

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67. PERFORMANCE OBJECTIVE

Given different brochures, display racks, and plan for display, authorize brochure displays prior to display and according to organization's goals and policies.

PERFORMANCE GUIDE

1. Review brochures.
2. Review brochure plan.
3. Authorize display.

TOOLS AND EQUIPMENT

Brochures
Display rack

G. Duty: Performing Fiscal Management

1. Task: Prepare bank deposits

---

68. PERFORMANCE OBJECTIVE

Given daily receipts of cash and checks, prepare bank deposits on a daily or weekly basis as necessary. Develop and maintain continuous record of deposits.

PERFORMANCE GUIDE

1. Count currency and change.
2. Stamp and/or endorse all checks.
3. Record cash and checks for deposit on cash receipt ledger.
4. Complete and prepare for deposit listing of cash and checks on hand deposit form.
5. Deliver to bank.

TOOLS AND EQUIPMENT

Company forms
Bank forms
Pencil
Pen
Calculator
Computer terminal

G. Duty: Performing Fiscal Management

2. Task: Prepare statistical reports

---

69. PERFORMANCE OBJECTIVE

Given fiscal policies/procedures, daily log reports, records management books, and a calculator, prepare statistical reports. Statistical reports must contain: total number of records and data according to company policy and format.

PERFORMANCE GUIDE

1. Supervisor identifies the activities to be included on the report.
2. Supervisor develops or assists in developing a format.
3. Complete daily log reports.
4. Supervisor identifies additional items to be reported to management on activities.
5. Prepare statistical report on activities for management.

TOOLS AND EQUIPMENT

Paper
Pencil
Calculator
Data
Computer terminal

G. Duty: Performing Fiscal Management

3. Task: Maintain cash flow programs

---

70. PERFORMANCE OBJECTIVE

Given past cash flow information, needs assessment, computer, calculator, and company format, maintain cash flow program according to organizations guidelines.

PERFORMANCE GUIDE

1. Review past cash flow information.
2. Review standard accounting program.
3. Examine record of all cash income.
4. Examine record of all cash disbursements.
5. Determine fixed expenses.
6. Estimate variable expenses.
7. Estimate income.
8. Review organization's guidelines for cash flow maintenance.
9. Perform appropriate action in accordance with company policy.

TOOLS AND EQUIPMENT

Cash flow records
Organizational policies and procedures
Program needs assessment
Computer terminal
Calculator

G. Duty: Performing Fiscal Management

4. Task: Maintain operating budget system

---

71. PERFORMANCE OBJECTIVE

Given an operating budget, a computer, program needs assessments, and calculator, budget system, setting project income and expense goals sufficient to conduct business to meet company goals and policies.

PERFORMANCE GUIDE

1. Review past operational history of revenue and expense requirements. If new business, consult existing business of like nature for background information needed.
2. Establish annual program needs for operation requirements.
3. Establish monthly, weekly, if necessary, operation requirements.
4. Allow for operating reserve account.
5. Allow for quarterly, monthly, if necessary, budget review and adjustment process.

TOOLS AND EQUIPMENT

Operating budget
Computer terminal
Program needs
Calculator
Paper
Pencil

G. Duty: Performing Fiscal Management

5. Task: Maintain standard accounting program

---

72. PERFORMANCE OBJECTIVE

Given computer, calculator, organization policies and procedures, the need to establish a true measurement of financial affairs, maintain an accounting program which includes record keeping of all revenue and expenses, and ability to prepare statistical report. This program will vary depending upon level of business demand and expertise.

PERFORMANCE GUIDE

1. Obtain necessary office equipment; e.g., calculator, typewriter, computer if program size warrants, etc.
2. Obtain general ledger program materials.
3. Identify assets and liabilities to establish balance sheet.
4. Identify sources of income and expense to set up chart of accounts.
5. Post/record all transactions monthly or weekly, if necessary.
6. Compile month-end reports.
7. Compile quarterly reports.
8. Compile annual reports.

TOOLS AND EQUIPMENT

Computer
Calculator
Organization's policies and procedures
Pencil
Paper
Accounting program/procedures

G. Duty: Performing Fiscal Management

6. Task: Reconcile monthly bank accounts

---

73. PERFORMANCE OBJECTIVE

Given the need to maintain appropriate records of financial affairs, monthly bank statement, all cancelled checks, plus record of deposits made to, reconcile monthly bank accounts. Status of accounts is established and statements are accurate.

PERFORMANCE GUIDE

1. Compare all cancelled checks returned against check register to determine what checks have been cashed and what checks are still to be presented for payment.
2. Compare account balance with check register to confirm totals.
3. Compare all deposit receipts against monthly statement to ensure all deposits were credited to account.
4. Use prior month's reconciled statement as point of initial review.

TOOLS AND EQUIPMENT

Calculator
Pencil
Paper
Computer terminal
Monthly bank statements
Cancelled checks
Check record
Deposit record
P.E.P. program or Bookers Association

G. Duty: Performing Fiscal Management

7. Task: Determine optimum process for reproducing printed materials

---

74. PERFORMANCE OBJECTIVE

Given materials to be reproduced, current cost-per-copy figures for each graphic reproduction process available, number of copies desired and date copies are needed, determine optimum process for the reproduction of printed materials. Decision must provide for desired number of copies being made available within allotted time at least expense.

PERFORMANCE GUIDE

1. Identify the graphic reproduction processes (such as xerographic copier, spirit duplicator, offset, or mimeograph) that could accommodate the material.
2. Determine the operational status (working, limited functioning, broken) of the equipment involved in each of the feasible processes.
3. Identify from among the processes available those that could produce the desired quantities within the allotted time.
4. Calculate the costs of producing the desired number of copies for each of the processes still under consideration.
5. Select the least costly graphic reproduction process.

TOOLS AND EQUIPMENT

Materials to be reproduced
Current cost-per-copy figures for each graphic reproduction process available
Number of copies desired
Date copies are needed

G. Duty: Performing Fiscal Management

8. Task: Prepare budgets

---

75. PERFORMANCE OBJECTIVE

Given records of past sales/activities by designated fiscal periods (annual) knowledge of management techniques and awareness of financial factors affecting business (labor and overhead costs), prepare budget. An operating budget (sales, labor, and overhead) must be established based upon analysis of previous costs and present situation that can be used for comparison with actual costs and projections.

PERFORMANCE GUIDE

1. Obtain a copy of income statement from previous accounting period.
2. Determine planned volume of business and expenses for new period.
3. Estimate gross sales, cost of goods sold, and net sales for new period.
4. Determine fixed and variable expenses for each department.
5. Calculate operating profit.

TOOLS AND EQUIPMENT

Sales records
Facility maps
Computer terminal
Calculator
Pencil
Pen
Budget sheets
Paper

G. Duty: Performing Fiscal Management

9. Task: Prepare statements for mailing

---

76. PERFORMANCE OBJECTIVE

Given completed client/customer records and corresponding account sheets and a supply of statements, prepare a statement for each client whose name appears on the client records. All necessary information should appear without error in the appropriate spaces.

PERFORMANCE GUIDE

1. Obtain daily receiving log form.
2. Gather purchase invoices.
3. Compare each purchase invoice with daily receiving log.
4. Check quantity received against invoice.
5. Check the unit charges on the invoice.
6. Check the extensions and totals on the invoice and make the necessary corrections.
7. Write the invoice date, amount, credits (corrections), and balance (corrected balance) on the right-hand side of the daily receiving log across from the name of the supplier.

TOOLS AND EQUIPMENT

Client/customer records
Account sheets
Statements
Typewriter
Pen
Envelopes

G. Duty: Performing Fiscal Management

10. Task: Audit daily business

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77. PERFORMANCE OBJECTIVE

Given cash register readings and cash summary report, audit daily business. The cash summary report must be verified, approved, and all discrepancies must be reconciled.

PERFORMANCE GUIDE

1. Examine readings and the completed daily cash summary report.
2. Check cash balance of each register.
3. Determine reasons for cash shortages or cash overages.
4. Reconcile any discrepancies on the cash report.
5. Sign the completed daily cash summary report as approved.

TOOLS AND EQUIPMENT

Cash register readings
Cash summary report
Pen
Pencil
Computer terminal
Calculator

G. Duty: Performing Fiscal Management

11. Task: Prepare financial reports

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78. PERFORMANCE OBJECTIVE

Given computer terminal, budget, calculator, pencil, paper, revenue reports, expense report, prepare financial reports providing accurate presentation of financial status.

PERFORMANCE GUIDE

1. Determine which financial reports are required by the company.
2. Obtain copies of previous financial reports.
3. Calculate financial reports according to company policy. For example:
   a. Income statement
      1) Review income statement from previous accounting period.
      2) Determine income (cash receipts) for period in review.
      3) Determine expenses (cash disbursements) for period in review.
      4) Calculate net cash flow:
         Starting balance
         + Cash receipts
         - Expenses
         = Net cash flow
   b. Balance sheet
      1) Review balance sheet from previous accounting period.
      2) List all assets for period in review.
      3) List all liabilities for period in review.
      4) List net worth for period in review.
      5) Calculate balance sheet:
         Assets = Liabilities + Net worth

TOOLS AND EQUIPMENT

Computer terminal
Budget
Calculator
Pencil
Paper
Revenue reports
Expense reports

TRAVEL/TOURISM
TOOLS AND EQUIPMENT

Accession logs/ledgers/ registries	1.28	Company forms	2.56
		Company functions and goals	3.84
Account sheets	1.28	Company organizational chart	1.28
Accounting program/procedures	1.28	Company policy/procedures	15.38
Activity records	1.28	Computer terminal/software	57.69
Addressee information	1.28	Consultation reports	1.28
Advertising tools	1.28	Contract services/directory	1.28
Anticipated work flow	1.28	Contracts	1.28
Articles	1.28	Copy	1.28
Audiovisual materials	3.84	Copy machine	1.28
Auto tool kits	1.28	Criteria for prioritization	1.28
Automobile	1.28	Current cost-per-copy figures for each graphic reproduction process available	1.28
Bank forms	1.28		
Bid proposals	2.56		
Blackboard	1.28	Current workloads	1.28
Blueprints	1.28	Data	5.12
Brochure proof	1.28	Date stamp	1.28
Brochures	19.23	Department/facility policy/ automated, mechanical procedures	1.28
Budget allocation	7.69		
Budget sheets	1.28		
Business cards	1.28	Departmental production capabilities	1.28
Calculator	19.23		
Calendar	8.97	Deposit record	1.28
Cancelled checks	1.28	Diagnostic reports	1.28
Cash flow records	1.28	Dimensions and physical features of an office	1.28
Cash register readings	1.28		
Cash summary report	1.28	Display racks	2.56
Catalogs	1.28	Document	1.28
Check record	1.28	Employee applications	1.28
Clean cloth	1.28	Employee list	1.28
Client specifications	1.28	Employee's personnel file	2.56
Client/customer records	1.28	Envelopes	1.28

Expense reports	2.56
Facilities directory	10.25
Facility maps	1.28
Fan belts	1.28
Fee schedule	1.28
File cabinet	1.28
File dividers	1.28
File folders	3.84
Flashlight	1.28
Flipchart	2.56
Forms	5.12
Fuel	1.28
Function record	1.28
General traffic patterns	1.28
Hammer/screw driver	1.28
Index cards	1.28
Information/data	5.12
Inventory	1.28
Inventory sheets	1.28
Job classifications	1.28
Job description manual	2.56
Knowledge of business	1.28
Labels	1.28
List of duties	1.28
List of employees	1.28
List of furniture and equipment required	1.28
List of interview questions	1.28
List of topics	1.28
Listing of specialized services	1.28
Listing of tour operators	1.28
Location for meeting	1.28
Lodging directory	1.28
Log books	2.56
Mail	1.28
Mail registers (incoming and outgoing)	1.28
Maps	6.41
Materials	2.56
Materials to be reproduced	1.28
Medical record files/cabinet	1.28
Medical record folders	1.28
Meeting schedule	1.28
Microphone	1.28
Monthly bank statements	1.28
Names and pending arrival times of guests	1.28
News items	2.56
Newspaper directory	1.28
Number control index	1.28
Number machine	1.28
Office manual or employee instruction book	2.56
Office supplies	1.28
Oil/oil filters	1.28
Operating budget	1.28
Order forms	1.28
Organization goals	1.28
Overhead projector	2.56
Paper	55.12
Paper clips	1.28
Patient discharge summaries	1.28
Patient index cards	1.28
Patient index file (card file) drawer, colored file flags	1.28
Patient medical histories	1.28
Pencil/pen	75.64
Performance goals	1.28
Photographer	1.28
Physicians progress notes	1.28
Posters	1.28
Program data	1.28
Program needs	1.28
Program needs assessment	1.28

Project schedule	1.28	Ruler	1.28
Promotional materials	3.84	Sales records	1.28
Promotional plan	1.28	Schedule of events	8.97
Property management reference/ text	1.28	Staple remover	1.28
		Statements	1.28
Public relations tools	1.28	Table cloth	1.28
Rate listing	1.28	Tables	1.28
Record of accomplishments	1.28	Tasks to be performed	1.28
Record sheet	1.28	Telephone	19.23
Registration form (face summary sheet)	1.28	Telephone book	1.28
		Telex	1.28
Report format guidelines	1.28	Therapeutic reports	1.28
Reports	1.28	Tour plan	1.28
Reservation cards	1.28	Transportation schedule	1.28
Reservation sheet	1.28	Typewriter with desk and chair	12.82
Resource materials	1.28	Vehicle manufacturer's manuals	1.28
Revenue reports	1.28	Work schedules	2.56